

# CAPITAL CITY FINANCIAL PARTNERS

NEWSLETTER



**SEPTEMBER 2024**

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## PICKLEBALL TOURNAMENT:

Join us for the next Client Event  
in our Capital City Community  
Connection Series!

This is a BYOP (Bring Your Own  
Paddle) event. Don't have one?  
No problem—contact our office,  
and we'll hook you up!

## UPCOMING CLIENT WEBINAR

We are excited to invite all our  
clients to our virtual webinar,  
***Understanding Your Medicare  
Options***, on October 10th at 6:30  
P.M. Hosted by Adam Smith, Partner  
and Financial Advisor, this session  
will provide valuable insights into the  
annual Medicare enrollment period,  
including important details about  
when and how to enroll in or switch  
Medicare plans. We look forward to  
seeing you there!

[CLICK HERE TO SIGN UP!](#)

## UPCOMING:

### Client Event

September 18th: Pickleball Tournament,  
*Lexington Leisure Center*, 11:30 a.m.

### Educational Events

September 10th: Taxes in Retirement,  
*Columbia*, 6:30 p.m.

September 12th: Taxes in Retirement,  
*Columbia*, 6:30 p.m.

September 17th: Medicare Made Simple,  
*Greenville*, 11:30 a.m.

September 19th: Taxes in Retirement,  
*Columbia*, 1:30 p.m.

September 25th: Income and Social Security,  
*Columbia*, 1:30 p.m.

### Webinars

September 9th: Taxes in Retirement,  
*Virtual*, 7:00 p.m.

September 24th: Taxes in Retirement,  
*Virtual*, 7:00 p.m.

### Office Closure

September 2nd: Labor Day







## COUNTDOWN TO TAX SEASON:

Make the most of your fall finances with these tax planning tips!

- Review Changes in Tax Law
- Maximize Retirement Contributions
- Plan for Itemized Deductions
- Review your Tax Withholding
- Consult with our Tax Professional, Alli, if you haven't already done so!

Alli Stephen, CPA

*Director of Tax Solutions, Advisory Consultant*

## DON'T LET TAXES DERAIL YOUR RETIREMENT.

We value offering our clients resources, on our website, that can help navigate the complexities of taxes in retirement.

Our complimentary guides cover:

- The impact of different retirement accounts on your tax bill
- How the ever-changing tax laws can affect your income
- Strategies to help maximize tax deductions in retirement





## INCOME PLANNING CHECKLIST

- Plan for a long life
- Evaluate your goals
- Health care expenses
- Social Security benefits
- Housing plan
- Taxes in retirement
- Plan for long-term care assistance
- Distribution strategies
- Consider inflation
- Financial products in retirement

This checklist has been repurposed from our whitepaper document, "Retirement Income Planning Checklist."

## Embrace the Fall Equinox!

As we transition into autumn and the days grow shorter, it's a good time to revisit your financial goals. To help you stay on track, we've included this checklist to help you refresh.

Use it as a guide, and don't forget to schedule a meeting with your financial advisor to assess your accounts.

Let's make this fall a season of financial growth and success!

## Upcoming posts on our *Inspired To Retire* Blog:



### *Will Presidential Election Results Impact My Retirement?*

Don't let the election rattle your retirement outlook.



### *Investing on a Budget*

BUILDING WEALTH WITH SMART, AFFORDABLE STRATEGIES





# TEAM UPDATES



Michael Norris's son, John, took his first steps!



Sissy started her senior year at Clemson University!



Michael Norris's wife, Lisa, was baptized!



Our Columbia clients got to learn from the FBI at the Cybersecurity Elder Fraud Presentation.

# Stay connected with Capital City Financial Partners on social media!



## Connect With Us

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